

ALTERNATIVE TRANSPORTATION BRAND STRATEGY

Prepared for:

Washington State Department of Transportation

July 1998

Submitted by:



© 1998 BrandSolutions, Division of Publicis, Inc.

CONTENTS

I. Project Background.....	3
II. Executive Summary	4
III. Research Objectives and Strategies	7
IV. Quantitative Research Methodology	10
V. Quantitative Research Results.....	12
Customer Identity	12
Organizational Identity.....	18
Competitive Identity.....	20
Product Identity	22
VI. Conclusions and Recommendations	38
Research Highlights.....	38
The Alternative Transportation Brand Identity	39
Recommended Brand Strategies.....	41

I. Project Background

The Commute Trip Reduction (CTR) Office at the Department of Transportation (WSDOT) contracted with a strategic research and marketing group to assist in the development of a sustainable umbrella campaign to promote the use of alternatives to the single-occupant vehicle (SOV). This project is being developed in response to the employers and jurisdictions affected by the Commute Trip Reduction Law. This group, along with other transportation professionals, identified the need for broader support for worksite CTR programs and awareness of transportation options and issues in general. Through follow-up research and additional feedback, WSDOT determined that a sustained, umbrella campaign that introduces and stresses a compelling, consistent message was the most effective strategy to meet the employers' and local jurisdictions' needs.

The purpose of the umbrella campaign is to build on the existing infrastructure and local efforts already underway by developing a common message (s) that can be adopted by all groups promoting the use of non-single-occupant vehicle transportation options. Sharing a common message will help create a more unified front to an industry with many services.

A key strategy in the development of the umbrella campaign is an innovative marketing process called "branding." Creating a brand identity is a powerful marketing tool that builds on the compelling emotional associations (images, symbols, words) that tie directly to our self-esteem. Specifically, a brand is a visual, emotional, rational, and cultural image that surrounds a company, organization, product, or service. The car manufacturers have invested billions of dollars in building their automobile brands. The goal of this research is to build a brand for alternative transportation. The research has been conducted in three parts: branding workshops with constituents; focus groups with people who have used or may try an alternative to driving alone; and finally a quantitative phone survey. This report includes findings from the quantitative study and makes the final recommendations for an alternative transportation brand identity, target audiences, and general direction of the campaign. Next steps in the development of the campaign include creative-concepting and testing, development of a strategic marketing plan, production, and implementation. The umbrella campaign is scheduled to launch in October 1998.

For more information please contact Sharon Rice, WSDOT, at (360) 705-7911 or by E-mail at rices@wsdot.wa.gov.

II. Executive Summary

A strategic research process was designed to gain extensive feedback from employers and jurisdictions affected by the CTR Law, transit employees, transportation professionals, and members of any other organization sharing the common goal of reducing single-occupant vehicle travel. The purpose of the research was to identify target markets and the marketing and advertising strategic directions to aid WSDOT in promoting the use of non-single-occupant transportation options.

Since January 1998, seven branding workshops (organized feedback sessions), four focus groups, and several one-on-one interviews have taken place. This information helped to direct research questions for a statistically-valid quantitative phone survey. This report summarizes the key findings of this research and makes specific recommendations to direct the development of the umbrella campaign.

Telephone interviews were conducted in the nine CTR-affected counties with almost 2,000 current users or people who have tried an alternative to driving alone. The target profile for the interviews included 18 - 54 year old commuters who commute to work between 6:00 - 9:00AM.

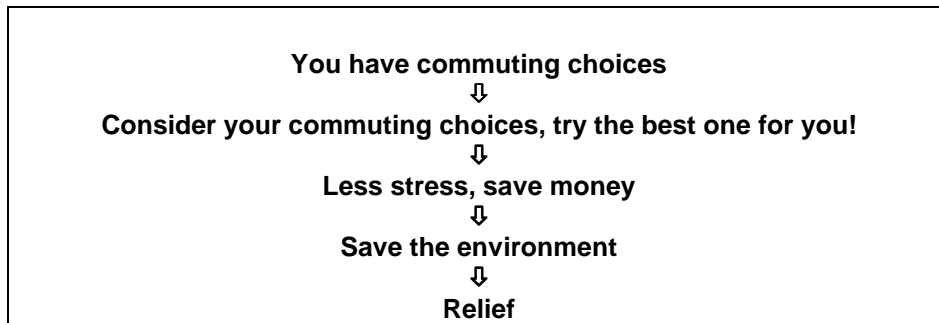
The survey respondents were divided into two distinct groups: Alternative Transportation Users (Users) and Alternative Transportation Triers (Triers). Users are defined as having used an alternative mode two or more days over the last two weeks. Triers are defined as having tried an alternative mode at some point, as an adult. The survey proportion is roughly 60% Users and 40% Triers.

The research highlights and recommendations include the following:

1. Focus the brand message and media on the following **target audience**:
 - ◇ Age: 25-44 years old
 - ◇ Occupation: Professional, Skilled labor, Administrative
 - ◇ Education: Some college education
 - ◇ Average HH Income: \$57,000
2. Build the **brand identity** on a foundation of benefits that are tangible, personal, and immediate. Triers will choose alternative transportation if they can:
 - ◇ **Reduce stress** by not having to drive in traffic
 - ◇ **Save money** by reducing gas, car expense and parking
 - ◇ **Save the environment** to provide a better world for future generations
 - ◇ These tangible benefits lead to higher level emotional benefits of “**Relief**” and “**Smart.**”

3. Build the brand identity on the “product,” i.e. the wide variety of **commuting choices** (e.g. ride or drive with someone else). **Increase awareness of alternative transportation choices:**
 - ◇ Awareness of choice is the key opportunity.
 - ◇ A perceived lack of choice is the key barrier among non-users.
 - ◇ Only 55% of respondents are aware of transit, 48% are aware of carpools, 20% are aware of bicycles as commuting choices.
 - ◇ Awareness of vanpools, walking, flex time, and telework as alternative transportation choices is very low.
4. Focus on **carpools** as the largest alternative transportation opportunity.
 - ◇ Carpools are the most widely used mode of alternative transportation
 - ◇ Carpools also present a variety of partnering opportunities:
 - ◇ Auto dealers, who see the marketing value of being perceived as responsible citizens and as part of the solution to congestion and saving the environment for future generations.
 - ◇ 1-888 Rideshare and HOV Infrastructure agencies
5. **Commuter satisfaction** levels with transit is low compared to other alternatives.
 - ◇ Transit has the lowest satisfaction rating and the least positive image. 21% of Triers are dissatisfied with transit. This is a barrier to converting Triers into regular Users.
 - ◇ 45% of the total state would support an improved transit service. The range is 49% in King, Thurston, and Pierce counties to 37% in Spokane and Yakima.
6. Work with employers to increase opportunities for **telework** and **flex time**.
 - ◇ Employees will chose an alternative way to commute if able to telework or work flex time. In this survey, these incentives are more motivating than cash.

The above conclusions lead to a clear brand identity or story for alternative transportation that says:



A Brand Story is the strategic foundation upon which great creativity is built. The Alternative Transportation Brand Story is built on the foundation of “Choice” and evolves to the emotional benefit of “Relief.”

III. Research Objectives and Strategies

The research objectives include:

- ◇ Identifying target markets and the marketing and advertising strategic directions to aid WSDOT in promoting the use of non-single-occupant transportation options.
- ◇ Contribute to the development of a sustainable state-wide umbrella campaign strategy and brand identity for alternative transportation.
- ◇ Work closely with CTR-affected employers and jurisdictions and other transportation professionals to develop brand identity for alternative transportation.

The Branding Process



Branding, the most powerful concept in the commercial world, is very effectively used by the automobile and petroleum companies to create an emotional dependence and attachment to automobiles and the feeling of driving. Branding, combined with huge media spending, has made “driving alone in my car” an American icon for freedom. This is formidable competition. Changing behaviors

and attitudes about “driving alone in my car” is a very difficult problem. To succeed, we must be as smart in the use of branding techniques as the automobile and petroleum companies, and we must be very focused and effective in our marketing and communications.

A brand is more than simply a name and a logo. A brand is a Trustmark, most simply, a promise made to a customer. A brand is much more than a logical argument about the advantages of alternative transportation over the SOV. It is the proprietary visual, auditory, rational, emotional, and cultural image surrounding the practical and altruistic benefits of alternative transportation. We need to make the case for alternative transportation in such a way that it is noticed, remembered, and compelling enough that commuting behavior actually changes.

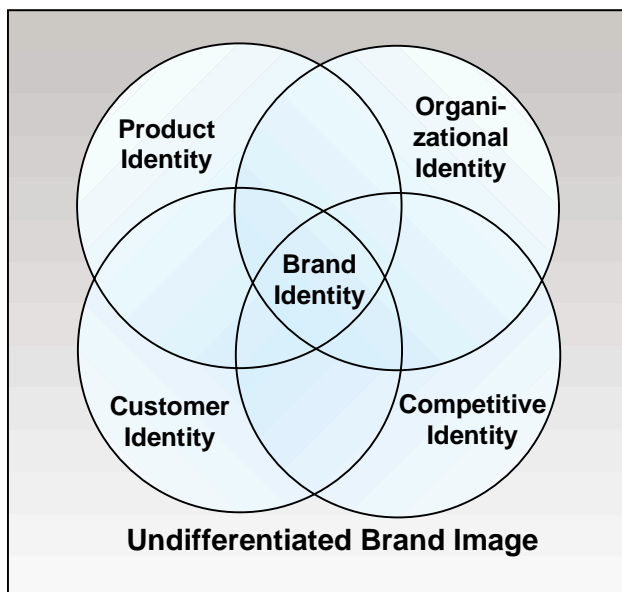
Applying this strategy to the diverse industry of alternative transportation stretches the traditional application of branding. However, by following the brand identity model explained next, a similar process can be duplicated to strategically create a common, compelling message for alternative transportation services.

The Brand Identity Model

What Makes A Brand Identity?

- A. Brand identity is the set of consciously chosen messages and images that produce the highest perceived value in the hearts and minds of the target audience. In the case of Alternative Transportation, we identify the best descriptions of the different modes of Alternative Transportation and identify the messages, most highly ranked benefits, images, and themes that will most effectively change commuter behavior.

Alternative transportation has a brand image that has developed without conscious and coordinated thought and strategy. The most effective brand identity for Alternative Transportation is created through a synthesis of commuter demographics (Customer Identity), the values of using Alternative Transportation (Organizational Identity), our automobile-centric culture (Competitive Identity), and the actual benefits of using Alternative Transportation (Product Identity).



Note: this process is the same type of process used by the most successful brands. A person who attended a recent BrandSolutions branding workshop came up afterwards and said “When I was with Coke, I attended a two-day seminar on branding and it was virtually identical to yours.”

Because Brand Identity is at the intersection of each of these components, it is succinct and, ideally, simple. This makes it much easier for commuters to remember the Alternative Transportation Brand Story.

B. A brand identity is composed of five basic elements:

- ◇ Brand Name
- ◇ Positioning statement
- ◇ Rational/tangible/physical brand associations
- ◇ Emotional/personality/intangible brand associations
- ◇ Associative assets: jingle, symbol, tagline

Branding Steps Completed To-Date

To accomplish our objective of creating a brand identify for alternative transportation, the following steps have been taken to-date. Each step builds on a previous step in a logical manner.

1. Produced a situation analysis that included a review of existing transportation related research.
2. Conducted seven brand workshops with CTR employers, jurisdictions, transit agencies, and other transportation professionals:
 - ◇ Internal WSDOT Steering Committee, 10/24/97
 - ◇ 9 CTR County Coordinators, 12/9/97
 - ◇ Clark County/Oregon, 1/8/98
 - ◇ Spokane/Yakima Counties, 1/22/98
 - ◇ Snohomish/Whatcom/King Counties, 1/29/98
 - ◇ Thurston/Pierce/Kitsap Counties, 2/6/98
 - ◇ King County, 2/10/98
1. Conducted nine interviews with ETCs of CTR-affected companies, identified by WSDOT and local jurisdictions to have had success with their CTR program.
2. Conducted several one-on-one interviews with transportation professionals.
3. Conducted four qualitative focus groups among commuters open to alternative transportation. Two groups were conducted in Seattle and two groups in Spokane in order to capture regional differences between Western and Eastern Washington.
4. Conducted a benchmark quantitative study of 1,198 Users and Triers of alternative transportation within 9 CTR-affected Washington counties. Details on this study are included in this report.

Additional research steps still to be accomplished at this date include:

- ◇ Testing of alternative creative concepts developed from the branding research
- ◇ A final assessment and brand concept recommendation

IV. Quantitative Research Methodology

Telephone interviews were conducted among the nine CTR-affected counties. The target profile for the interviews included 18 - 54 year old commuters, who commute to work between 6:00 - 9:00AM.

The survey respondents were divided into two distinct groups: Alternative Transportation Users (Users) and Alternative Transportation Triers (Triers). Users are defined as having used an alternative mode two or more days over the last two weeks. Triers are defined as having tried an alternative mode at some point, as an adult. The survey proportion is roughly 60% Users and 40% Triers.

The sample was stratified to obtain a representative sample of the nine counties. The individual county sample size reflects the actual adult populations of each county, according to 1997 Census Projections.

County	Sample	County	Sample
Clark	100	Spokane	120
King	398	Thurston	60
Kitsap	61	Whatcom	49
Pierce	200	Yakima	60
Snohomish	150	TOTAL	1,198

The margin for error for a 1,198 sample size is ± 2.9 points, at 95% confidence.

Quantitative Research Questions

The purpose of the quantitative benchmark research study is to answer the following key strategic questions:

1. What is the demographic profile of current alternative transportation customers?
2. What are the "Hot Buttons:" the main reasons customers choose and remain loyal to alternative transportation?
3. What messages will be most motivating to convince people to try to use alternative transportation?
4. What are the top ranked employer benefits that will motivate employees to try to use alternative transportation?
5. What is the overall level of customer satisfaction with alternative transportation? How loyal are alternative transportation customers?

6. What is the overall level of awareness of the various modes?
7. What is the perceived quality of various modes?
8. What are the top ranked barriers that prevent usage of alternative transportation?
9. What are the top ranked values that customers associate with alternative transportation?
10. What is the opportunity for an improved transit service? How much would customers be willing to pay for such a service?

V. Quantitative Research Results

Customer Identity

1. Who Is the Customer for Alternative Transportation (According to Brand Workshop Participant Responses)?

During the nine brand workshops, participants (Alternative Transportation professionals) were asked to describe the potential customer for alternative transportation. Participants then voted to determine which of the descriptions have the broadest support.

The majority of brand workshop participants perceive the “Customer” to be “all current commuters.” A significant number of participants also view young, non-drivers as an opportunity. The goal is to reach these young, future drivers before they become entrenched in the car culture.

Details of the results are highlighted below.

<u>Customer</u>	<u>Votes</u>
All current commuters	53
Future generations/HS Students	39
SOV's	13
Anybody with access to alternatives	13
People concerned with the environment	10
People already using alternatives	10
Women/mothers	9
People who have used an alternative	9
People open to change/progressive	7
Employees with inadequate parking	6
People sitting in traffic	6
Lower income	6
Urban dwellers	5
Targeted groups of commuters	5
Cost conscious consumers	4
Commute longer distances	4

2. Actual Customer Demographics

The actual customer profile is 25-44 year olds (rather than 18-44 as previously recommended) and has a Professional, Skilled labor, or Administrative job.

The demographic profiles of both Users and Triers are largely similar. This is good because the same brand identity and message will work with both current and prospective customers of alternative transportation.

	Users (714)	Triers (484)
<u>Age</u>		
18-24	14%	9%
25-34	25%	25%
35-44	44%	47%
45-54	18%	20%
Female	52%	53%
Male	48%	47%
Married	64%	68%
Children in HH	44%	45%
<u>Occupation</u>		
Professional	31%	32%
Skilled Labor	17%	18%
Administrative	13%	14%
Sales	8%	7%
Clerical	6%	9%
Service Worker	6%	6%
Self-employed	4%	3%

Customers have some college education and a household income of \$57,000. 63% have had at least some four-year college education; 41% are college graduates.

Higher education leads to higher household incomes averaging \$57,000.

	Users (714)	Triers (484)
<u>Education</u>		
College Graduate	26%	28%
Some College	22%	24%
2-Year College	18%	15%
High School	17%	15%
Graduate School	15%	15%
Average HH Income	\$57,100	\$57,500

In summary, alternative transportation customers tend to be younger, better educated, and have higher household incomes than average for the state.

3. Demographics, by County

Customer profiles vary significantly by the county they reside in. For example:

- ◇ Clark County customers have relatively high incomes, comparable to King county, are less likely to have graduated from college, and tend to be married with children.
- ◇ King County customers are more likely to be female, 35-44 year olds with very few older than 45, college educated with higher incomes, and less likely to have children in the household.

- ◇ Snohomish customers tend to be older (31% 45-54), and more likely to be service workers.
- ◇ Spokane customers have significantly lower incomes and commute fewer miles to work.
- ◇ Thurston/Pierce county customers tend more to be skilled labor workers, who commute longer distances.

	Total (Sample)	Clark (100)	King (398)	Snohom/ Whatcom (199)	Spokane/ Yakima (180)	Thur/Pier Kitsap (321)
<u>Age</u>						
18-24	12%	13%	12%	9%	12%	13%
25-34	25%	24%	26%	25%	24%	23%
35-44	45%	37%	57%	35%	43%	40%
45-54	18%	26%	5%	31%	21%	24%
Female	53%	49%	55%	52%	51%	51%
Male	47%	51%	45%	48%	49%	49%
Married	66%	69%	61%	69%	65%	68%
Children in HH	45%	66%	36%	45%	49%	45%
<u>Occupation</u>						
Professional	31%	28%	35%	30%	26%	32%
Skilled Labor	18%	24%	15%	13%	19%	21%
Administrative	13%	12%	13%	14%	14%	14%
Sales	8%	6%	7%	12%	7%	7%
Clerical	7%	4%	9%	6%	9%	6%
Service Worker	6%	4%	5%	10%	8%	5%
Self-employed	4%	6%	4%	5%	4%	2%
<u>Education</u>						
College Graduate	27%	18%	32%	28%	23%	25%
Some College	21%	22%	21%	21%	23%	25%
2-Year College	17%	18%	13%	19%	19%	19%
High School	16%	25%	13%	15%	20%	16%
Graduate School	15%	15%	18%	14%	13%	13%
AVG HH Income	\$57,300	\$61,400	\$61,400	\$58,200	\$49,100	\$55,200

4. Customer Usage of Alternative Transportation Modes

Ever Used

Respondents were asked during the survey: “Which, if any, of the following transportation alternatives have you used to commute to work? “

“Carpooling,” described in the survey as: “Driving or riding with at least one other person,” is the most popular form of alternative transportation. More than twice as many Users and Triers say they “Carpool” as say they ride the “Bus”.

We believe one factor driving the high percentage of respondents who report they “Carpool” is the manner carpooling was defined in the survey. It indicates some confusion regarding what qualifies as a carpool. For example, many

commuters might not consider riding to work with a spouse as a carpool. For that reason, the use of labels like “carpool” should be avoided; easy-to-understand descriptions of alternative transportation modes should instead be used in all communications to commuters.

The results indicate a large number of commuters are actually part of the alternative transportation solution, and are not getting credit for it. If they see inherent good and benefit in this activity and this “doing good” behavior is reinforced, they will drive or ride with someone else more often.

Very few currently commute by vanpool (4%) and train (2%).

<u>Commute Mode</u> (Sample)	<u>Total</u> (1198)	<u>Users</u> (714)	<u>User Frequency</u> <u># Days/2 Weeks</u>	<u>Triers</u> (484)
Carpool	70%	71%	4.5	69%
Bus	31%	35%	4.3	24%
Flex Time	22%	28%	5	13%
Bicycle	15%	16%	2.8	13%
Walk	15%	16%	3.5	1%
Telework	14%	17%	3.1	9%
Vanpool	4%	5%	5.3	2%
Train	2%	2%	2.2	1%

NOTE: Flex time includes a compressed work week. An opportunity lies in offering employees some flexibility with their work schedules, whether that flexibility is a result of flexible working hours or a compressed work week. Future tracking studies will break out flex time and compressed work week separately, to provide employers a better definition and direction on what they can do to be more effective in reducing SOV usage.

Mode Most Used

The alternative transportation modes most used by respondents include carpools, flex time, and the bus. Telework, bicycles, walking, vanpools, and the train offer only limited opportunity to meet the CTR objective and should not be a focus of the umbrella awareness campaign.

<u>Mode</u>	<u>Total</u>
(Sample)	(1198)
Carpool	35%
Flex Time	15%
Bus	15%
Telework	7%
Bicycle	6%
Walk	5%
Vanpool	2%
Train	1%

5. Customer Usage of Alternative Transportation Modes, by County

Although alternative mode use varies by county, carpools are still the most used mode in all counties.

	<u>Total</u>	<u>Clark</u>	<u>King</u>	<u>Snohom/</u>	<u>Spokane/</u>	<u>Thurs/Pierce</u>
<u>Commute Mode</u>	(Sample)	(1198)	(100)	<u>Whatcom</u>	<u>Yakima</u>	<u>Kitsap</u>
			(398)	(199)	(180)	(321)
Carpool	70%	77%	63%	73%	74%	74%
Bus	31%	29%	44%	23%	23%	26%
Flex Time	22%	27%	24%	27%	17%	19%
Bicycle	15%	13%	16%	12%	24%	12%
Walk	15%	19%	16%	13%	19%	12%
Telework	14%	17%	18%	13%	6%	12%
Vanpool	4%	1%	4%	4%	5%	5%

6. Customer Demographics, by Mode of Transportation

(BASE: Total Users)

Different alternative transportation modes attract different demographics. For example:

- ◇ Carpool users tend to be female, college-educated, with moderate incomes.
- ◇ Transit users tend to be female, with significantly lower HH incomes.
- ◇ Bike riders tend to be male.
- ◇ Vanpool users tend to be married, commute long distances, and have higher HH incomes.
- ◇ Teleworkers tend to be male professionals with highest HH income.
- ◇ Flex time users tend to be female with children in the household.

	<u>Carpool</u> (420)	<u>Vanpool</u> (29)	<u>Bus</u> (175)	<u>Bike</u> (66)	<u>Telecom</u> (83)	<u>Walk</u> (64)	<u>Flex</u> (180)
<u>Age</u>							
18-24	19%	10%	18%	21%	2%	25%	3%
25-34	29%	31%	22%	29%	23%	31%	22%
35-44	36%	45%	47%	41%	53%	31%	55%
45-54	17%	14%	14%	9%	22%	13%	21%
Female	54%	48%	60%	31%	44%	53%	54%
Male	46%	52%	40%	69%	56%	47%	46%
Married	62%	72%	55%	55%	72%	53%	73%
Children in HH	47%	45%	39%	38%	47%	38%	50%
<u>Occupation</u>							
Professional	30%	34%	29%	24%	44%	33%	35%
Skilled Labor	17%	17%	9%	27%	9%	13%	18%
Administrative	13%	14%	16%	11%	12%	3%	13%
Sales	8%	3%	6%	8%	12%	11%	9%
Clerical	5%	10%	11%	6%	4%	5%	5%
Service Worker	7%	0%	7%	5%	1%	13%	6%
Self-Employed	5%	0%	3%	3%	9%	2%	4%
<u>Education</u>							
College Graduate	27%	17%	25%	28%	41%	21%	27%
Some College	21%	17%	28%	23%	21%	26%	20%
2-Year College	20%	24%	12%	20%	13%	15%	19%
High School	17%	10%	19%	9%	2%	20%	16%
Graduate School	13%	28%	15%	17%	20%	16%	18%
Average HH Income	\$56,800	\$64,900	\$49,800	\$53,600	\$77,300	\$41,000	\$62,200

7. Media Usage: Radio

Respondents were asked during the survey: "What two radio stations do you listen to most often while you commute to work, if any?"

Public radio is rated as having a significant audience among customers in King County (KUOW) and in Snohomish/Whatcom Counties (KPLU). Public radio could be an opportunity worth exploring.

NOTE: Additional media analysis is warranted and planned.

Top Radio Stations by County

	<u>Total</u>	<u>1st</u>	<u>2nd</u>	<u>3rd</u>	<u>4th</u>
Clark	KKRZ	103FM	KWJJ		
King	KUOW	KJR	KUBE	KIRO	
Snohomish/Whatcom	KIRO	KPLU	KNDD	KPRM	
Spokane/Yakima	KATS	KZZU	KDRK	KEYF	
Thurston/Pierce/Kitsap	KIRO	KOMO	KJR	KNDD	

8. Media Usage: Newspapers

Respondents were asked during the survey: “What local newspapers do you read most often, if any.”

One finding is that the Seattle Times reaches significant percentages of alternative transportation customers in Snohomish and Whatcom counties, as well as King county.

Top Newspapers by County

<u>County</u>	<u>Newspaper</u>	<u>Total</u>
King	Seattle Times	59%
	Seattle PI	20%
Clark	The Colombian	62%
	The Oregonian	31%
Snohomish/Whatcom	Seattle Times	33%
	Everett Herald	28%
	Seattle PI	13%
Spokane/Yakima	Review/Spokesman	51%
	Yakima Herald	28%
Thurston/Pierce/Kitsap	Tacoma News Tribune	43%
	Seattle Times	18%
	Bremerton Sun	13%
	Olympian	12%

Organizational Identity

1. “What Business Are We In?” (Brand Workshop Participant Responses) (Source: Brand Workshops)

During the Brand Workshops, participants were asked to identify the “Business” of Alternative Transportation, i.e., what end result are we trying to achieve? Among brand workshop participants, the organizational identity is not clearly defined, as seen in a lack of consensus regarding “What business are we in?”

	<u>Business</u>	<u>Votes</u>
Quality of life, more space to be human, less stress/congestion		40
Transportation choices/alternatives		37
Changing behavior/lifestyle/perceptions		29
A more livable future/our future		28
Creative/better transportation systems		22
Provide mobility, a better way to bring people to work		20
Increase awareness of money savings		13
Provide a more attractive/livable/healthy community		11
Smart utilization of time, more commuter convenience		11
Save the planet/environment/air		6

2. Organizational Identity: What Commuters See

Commuters see no clear organizational identity representing “Alternative Transportation” or WSDOT. They see:

- ◇ A wide variety of diverse agencies and programs with a broad range of values and messages. (Source: The Rockey Company Audit)
- ◇ “WSDOT = Transit” (Source: Focus Group and Quantitative Research participant advice to WSDOT)
- ◇ “Alternative Transportation = Transit” (Source: Current Unaided Awareness results, plus results from prior research)

Simply equating alternative transportation with transit, the most visible mode, is not satisfactory. A clear opportunity exists to expand the perceived definition to include choices such as “driving or riding with someone else,” “working flexible hours,” “riding a bicycle,” etc.

3. Alternative Transportation Values

Respondents were asked to respond to the following question: “I am going to read you some values and ethics that might be associated with alternative transportation and I’d like to get your reaction to each. Using a 10 point scale, where 10 equals ‘Describes very well’ and 1 equals ‘Does not describe at all,’ please tell me how well each value describes using alternative transportation.”

Respondents associate smart, reliable, safe and secure, effective, and future-thinking with alternative transportation. Organizational and planning decisions regarding alternative transportation need to deliver on these values. These values can serve as guideposts to future transportation planning. Communicating that transportation decisions and plans are smart and effective for future needs, for example, will increase the perceived value of those decisions.

	<u>Total</u>	<u>Users</u>	<u>Triers</u>
<u>Values</u> (Sample)	(1198)	(714)	(484)
Smart	7.5	7.7	7.3
Reliable	7.3	7.5	7.0
Safe and Secure	7.3	7.5	6.9
Effective	7.2	7.4	7.0
Future Thinking	7.1	7.1	7.0
Honest and Ethical	6.9	7.1	6.6
Peaceful and Relaxed	6.9	7.2	6.6
Guilt Free	6.4	6.7	6.1
Happy	6.2	6.4	5.9
Walk the Talk	6.1	6.3	5.9
Empowered and Free	5.9	6.0	5.7

When participants were then asked to pick the one value that is the absolute most important for alternative transportation, most picked “Future Thinking.” Marketing communications must speak to the future, rather than relate to the past. “Retro” executions, i.e., the use of images that evoke the past or traditions, should be avoided.

	<u>Total</u>	<u>Users</u>	<u>Triers</u>
<u>Values</u> (Sample)	(1198)	(714)	(484)
Future Thinking	20%	18%	22%
Peaceful and Relaxed	17%	15%	18%
Smart	14%	14%	13%
Reliable	12%	12%	13%
Safe and Secure	11%	13%	9%
Effective	9%	9%	9%
Honest and Ethical	5%	5%	5%
Guilt Free	4%	5%	3%
Walk the Talk	4%	4%	4%
Happy	3%	2%	3%
Empowered and Free	2%	2%	2%

Competitive Identity

1. *Unaided Barriers to Commuting by Alternative Transportation*

Respondents, who have never commuted by an alternative mode, were asked “Why have you not commuted to work by one of these alternatives?”

A significant percentage of commuters, who never commute by alternative transportation, believe they have no other choice than driving alone. This finding supports the need to increase awareness of the wide variety of choices that are available to commuters, in addition to driving alone to work in a SOV.

Other perceived barriers to commuting by an alternative means include:

- Alternative transportation is too inconvenient, takes too long.
- Their work, or work schedule, requires them to drive their SOV.

<u>Barrier</u>	(Sample)	<u>Total</u> (90)
I have no other choice		20%
It's too inconvenient		19%
I need my vehicle		19%
I have an irregular work schedule		17%
The alternatives take too long		16%
There are no bus routes near me		14%
My commute distance is too far		8%
I like the freedom/spontaneity of my own car		8%
I like to drive		8%
It's too hard to carpool		7%
No one lives near me to carpool with		7%

2. Key Aided Barriers to Commuting by Alternative Transportation

Respondents were asked during the survey “Please tell me the degree to which each of the following might have an impact on your decision to not use an alternative means of commuting. Please use a 10 point scale where 10 equals ‘A very strong reason not to use an alternative mode’ and 1 equals ‘A very weak reason not to use an alternative mode.’”

The primary barrier is the perception that choosing an alternative mode results in sacrificing some personal freedom.

A second key barrier is the lack of a “Guaranteed Ride Home in an Emergency.” Prior interviews with affected employer ETCs indicates this fear needs to be addressed by employers in order to ensure broader employee participation in CTR programs.

<u>Barriers</u>	(Sample)	<u>Total</u> (1198)	<u>Users</u> (714)	<u>Triers</u> (484)
Lack of freedom to come and go when I want		7.5	7.4	7.7
I might have to go home in an emergency		6.9	6.8	7.2
Takes longer to commute to work		6.8	6.6	7.1
I need my car for errands		6.1	5.8	6.4
There isn't a convenient transit service like other cities		6.1	5.9	6.4
It is inconvenient to use alternative means		5.8	5.4	6.4
My work doesn't allow me to use alternatives		5.7	5.4	6
I have free or low cost parking at work		5.6	5.4	5.9
I feel safe and secure in my car		5.3	5.1	5.6
My car is a comfortable place to be		5.2	5	5.5
My boss won't let me telecommute, flex time		4.9	4.6	5.3
I have fun driving my car		4.8	4.7	5
Transit schedules, routes too hard to understand		4.1	4	4.2
I need my car for child care		4	4	4.1
I am concerned for my safety riding the bus		3.6	3.5	3.7
It's just for people who can't afford a car		2.9	2.8	2

Product Identity

1. *Alternative Transportation Unaided Awareness: First Mention/Top-of-Mind*

Respondents were asked: “When thinking of alternative ways to commute to work, which alternatives come to mind?” “First Mention” refers to their first response, the response that was on “Top of their mind.”

Although carpool use is very high, first mention awareness of carpools as an alternative mode is low, half that of transit. This is an important awareness opportunity; that is, commuters are not aware that driving or riding with someone else is an alternative and has inherent personal and societal benefits.

Triers are significantly more prone to mention “Driving Alone” first. Otherwise, Triers’ and Users’ awareness of alternative modes is equivalent.

First mention awareness for other alternative transportation modes is low.

	<u>Total</u>	<u>Users</u>	<u>Triers</u>
<u>Commute Mode</u> (Sample)	(1198)	(714)	(484)
Drive Alone	32%	29%	36%
Bus	30%	31%	29%
Carpool	17%	17%	17%
Bicycle	7%	8%	6%
Walk	5%	6%	4%
Vanpool	2%	2%	1%
Train	2%	2%	2%
Telework	1%	1%	1%
Flex Time	1%	1%	1%

2. *Total Alternative Transportation Unaided Awareness*

Total unaided awareness refers to the complete set of commute mode alternatives that come to respondents’ minds, without any help from a list.

Overall, unaided awareness of modes of alternative transportation is relatively low; little more than half (55%) mention the “Bus.” This further underscores the importance of increasing awareness of alternative transportation choices.

<u>Commute Mode</u> (Sample)	<u>Total</u> (1198)	<u>Users</u> (714)	<u>Triers</u> (484)
Bus	55%	55%	55%
Drive Alone	51%	48%	56%
Carpool	48%	50%	45%
Bicycle	20%	23%	17%
Walk	13%	13%	12%
Vanpool	7%	8%	4%
Train	7%	7%	6%
Telework	4%	4%	3%
Flex Time	2%	2%	1%
Ferry	2%	3%	1%

3. **Product Satisfaction**

Users of alternative modes of transportation were asked to rate their level of satisfaction with their most frequently used mode.

Significantly more “Carpool” users are satisfied with their choice, than are “Bus” users.

“Flex Time” users are most satisfied with their choice. 72% of “Flex Time” users are “Highly Satisfied.” “Flex Time” users are significantly more satisfied than “Telework” users.

Satisfied

<u>Mode</u>	<u>Sample</u>	<u>Highly</u>	<u>Somewhat</u>	<u>Net</u>
Flex Time	(180)	72.0%	19.0%	81.5%
Bicycle	(66)	68.0%	21.0%	78.5%
Telework	(83)	65.0%	25.0%	77.5%
Walk	(64)	63.0%	19.0%	72.5%
Carpool	(420)	51.0%	32.0%	67.0%
Bus	(175)	38.0%	42.0%	59.0%

NET SATISFIED SCORE FORMULA: A weighted average score that combines “Highly Satisfied” scores with “Somewhat Satisfied” scores, giving the highly satisfied score twice as much weight. This recognizes the significantly greater value of customers who are “Highly Satisfied.”

4. **Product Dissatisfaction**

A high percentage (21%) of transit Triers report dissatisfaction with transit. The transit infrastructure is a significant barrier to converting transit Triers into regular users.

% Dissatisfied

<u>Mode</u>	<u>Sample</u>	<u>Users</u>	<u>Triers</u>
Flex Time	(180)	8.0%	0.0%
Bicycle	(66)	8.0%	0.0%
Telework	(83)	4.0%	0.0%
Walk	(64)	5.0%	0.0%
Carpool	(420)	5.0%	6.0%
Bus	(175)	6.0%	21.0%

5. **Product Satisfaction: Carpools**

Carpool users were asked to explain why they were either satisfied (Positive) or dissatisfied (Negative) with carpooling.

The primary benefit of carpooling is having company while commuting.

Secondary benefits include “Saves money,” “Convenient,” and saving time by using the HOV lane.

“Good for environment” is mentioned by only 2% of carpool users.

	<u>Total</u>	<u>Freq</u>
<u>Positive</u> (Sample)	(420)	(196)
Like company while commute	26%	26%
Saves money	19%	19%
Convenient	14%	19%
Faster in carpool lane	13%	16%
Less stress/more relaxing	4%	5%
Don't have to park	4%	3%
More time for self	2%	3%
Good for environment	2%	2%
<u>Negative</u>		
Difficult to coordinate schedules	8%	5%
Inconvenient	5%	6%
Can't be spontaneous	3%	2%
Takes too long	3%	2%

Note: Frequent Users (Freq.) are defined as using that mode of transportation five or more days in the past two weeks.

6. *Product Satisfaction: Vanpools*

Vanpool users were asked to explain why they were either satisfied (Positive) or dissatisfied (Negative) with vanpooling.

Vanpool benefits are similar to those cited by carpool users. They include:

- ◇ Company while commuting
- ◇ Saving money
- ◇ Saving time in HOV lane

	<u>Total</u>	<u>Freq</u>
<u>Positive</u> (Sample)	(29)	(17)
Like company during commute	21%	29%
Saves money	21%	24%
Faster commute/carpool lanes	21%	24%
Convenient	14%	12%
Reliable	10%	6%
Good for environment	7%	6%
<u>Negative</u>		
Can't be spontaneous	7%	6%

7. *Product Satisfaction: Transit*

Transit users were asked to explain why they were either satisfied (Positive) or dissatisfied (Negative) with transit.

The goal of transit should be to provide convenient and reliable transit service. "Convenience" is the primary driver of Transit user satisfaction.

"Saving money" is an important secondary source of user satisfaction. With relatively lower household incomes, transit users are particularly motivated by this benefit. "Saving money" should be a clear, consistent message in all transit marketing communications.

Only 1% of transit users mention "Good for the environment" as a source of satisfaction.

	<u>Total</u>	<u>Freq</u>
<u>Positive</u> (Sample)	(175)	(88)
Convenient	23%	24%
Saves money	12%	14%
Reliable	10%	10%
More efficient	8%	11%
Less stress/more relaxing	6%	8%
Don't have to drive or park	6%	10%
Like company while commuting	3%	3%
More time for self	2%	2%
Good for environment	1%	1%
<u>Negative</u>		
Takes too long	11%	9%
Need more frequent buses	9%	8%
Busses not on schedule	7%	7%
Too crowded	5%	7%
Inconvenient	5%	1%
Rude people on bus	3%	1%

8. *Product Satisfaction: Bicycle*

Bicycle users were asked to explain why they were either satisfied (Positive) or dissatisfied (Negative) with riding a bicycle to work.

Most bike commuters do it for the “Exercise.” Living a healthy life is particularly important to this segment. “Convenient” and “Saves money” are important secondary benefits.

“Good for environment” is an important secondary benefit for only frequent users.

Safety is a concern for frequent users. Efforts that promote safe bicycle lanes and increase driver awareness and sensitivity toward bike commuters will reinforce user loyalty towards biking to work.

	<u>Total</u>	<u>Freq</u>
<u>Positive</u> (Sample)	(66)	(17)
Exercise/healthy	59%	59%
Convenient	8%	12%
Saves money	8%	12%
Less stress/more relaxing	6%	6%
Faster	5%	6%
Good for environment	5%	12%
Close to work	5%	0%
Freedom	2%	0%
<u>Negative</u>		
Inconvenient	5%	0%
Stressful	3%	0%
Not safe	3%	6%
Takes too long	2%	6%

9. Product Satisfaction: Walking

Commuters who walk to work were asked to explain why they were either satisfied (Positive) or dissatisfied (Negative) with walking.

Benefits of walking are similar to riding a bicycle. They do it for the exercise and opportunity to live more healthy lives.

Only 3% of walkers cite “Good for the environment” as a benefit.

	<u>Total</u>	<u>Freq</u>
<u>Positive</u> (Sample)	(64)	(29)
Exercise/healthy	55%	62%
Convenient	16%	17%
Saves money/wear on car	11%	20%
Close to work	8%	17%
Less stress/more relaxing	8%	10%
No traffic/don't have to drive	7%	6%
Good for environment	3%	3%
<u>Negative</u>		
Inconvenient	6%	3%
Takes too long	6%	3%
Unsafe	3%	0%

10. Product Satisfaction: Telework

Commuters who walk to work were asked to explain why they were either satisfied (Positive) or dissatisfied (Negative) with walking.

The primary benefit of telework is a sense of personal freedom, the ability to have a flexible work schedule.

“More family time” is a key secondary benefit of working at home.

“Convenience” and “Not having to drive” are also important secondary benefits.

“Saving the environment” was not mentioned as a benefit.

No significant negatives were mentioned.

	<u>Total</u>	<u>Freq</u>
<u>Positive</u> (Sample)	(83)	(21)
Enjoy freedom/flexible schedule	59%	91%
Close to home/more family time	23%	24%
Convenient	18%	24%
Don't have to drive or park	18%	24%
<u>Negative</u>		
Inconvenient	1%	0%

11. Product Satisfaction: Flex Time

Commuters who work flexible hours or a compressed work week were asked to explain why they were either satisfied (Positive) or dissatisfied (Negative) with their choice.

The benefits are equivalent to telework: they enjoy freedom and more time for family. Flex time users also appreciate not having to drive during rush hour periods.

However, flex time is not perceived to be as convenient as telework. "Inconvenience," and "Difficulty in coordinating schedules" are flex time negatives.

	<u>Total</u>	<u>Freq</u>
<u>Positive</u> (Sample)	(180)	(92)
Enjoy freedom/flexible schedule	80%	85%
More time for family/self	17%	15%
No traffic/don't have to drive	17%	17%
Convenient	11%	11%
More efficient	3%	3%
<u>Negative</u>		
Difficult to coordinate schedules	3%	1%
Inconvenient	3%	1%

12. Perceived Product Quality: Net Positive Attitude Scores

Respondents were asked during the survey "Below are some methods someone might choose as a means for commuting to work. Please rate how positive or negative your feelings are toward each of these methods. Use a 5 point score where 5 indicates your feelings are 'Very positive', a 3 point score indicates 'Neither positive nor negative,' and 1 indicates 'Very negative'."

Flex time" has the most positive image of all transportation alternatives, significantly higher than "Telework." Among actual transportation modes, carpool has the most positive image.

Triers have a high net positive attitude (51.5%) toward driving alone. "Bus" has the least positive image of all transportation alternatives.

<u>Mode</u> (Sample)	<u>Total</u> (1198)	<u>Users</u> (714)	<u>Triers</u> (484)
Flex Time	58.2%	57.5%	53.5%
Carpool	44.5%	47.0%	41.5%
Telework	44.5%	47.0%	42.0%
Drive Alone	44.0%	38.5%	51.5%
Vanpool	30.5%	30.5%	30.0%
Walk	28.5%	29.0%	27.5%
Train	27.0%	28.0%	27.0%
Bicycle	25.5%	28.5%	21.5%
Bus	24.5%	26.5%	21.0%

13. Employer Incentives Offered

Respondents were asked during the survey “Does your employer offer any programs, services, or incentives to encourage commuting by means other than driving alone?”

The most urban counties lead the state in employers offering incentives to choose alternative transportation.

	(Sample)	<u>Total</u>
Total	(1198)	33%
King	(398)	42%
Thurston/Pierce/Kitsap	(321)	34%
Snohomish/Whatcom	(199)	28%
Spokane/Yakima	(180)	24%
Clark	(100)	19%

14. Key Employer Incentives

Respondents were asked during the survey: “Please tell me the degree to which each of the following has an impact on your decision to use an alternative means of commuting. To do this, first think about your needs. Then, using a 10 point scale where 10 equals ‘Very important in my decision to use alternative transportation’ and 1 equals ‘Not at all important to my decision,’ tell me how important is..”

The key incentives employers can use to increase the use of Alternative Transportation are “Cash,” “Able to Work Flex Time,” and “Guaranteed Ride Home.”

<u>Incentives</u> (Sample)	<u>Total</u> (1198)	<u>Users</u> (714)	<u>Triers</u> (484)
Cash incentives	7.6	7.8	7.3
Able to work flex time	7.4	7.6	7.2
Guaranteed ride home	7	7.2	6.7
Subsidized carpools: money for gas	6.7	6.9	6.5
Able to telecommute	6.7	6.8	6.5
Guaranteed parking spaces	6.4	6.6	6
Subsidized vanpools	6.3	6.5	6.1
Subsidized bus passes	6.1	6.4	5.7
Preferred parking spaces	5.9	6.1	5.5
Positive management recognition	5.3	5.5	5
Showers/lockers	5	5.1	4.8
Covered bike parking	4.9	5.1	4.6
Sweepstakes for prizes	4.6	4.7	4.3

15. Most Important Incentive: Aided Via List

Respondents were then asked “Which (of the top 4 incentives mentioned) is the absolute most important?”

Most customers say “Cash Incentive” is the single most important incentive an employer can offer to encourage the use of alternative transportation. A significant, almost equal, number of customers say “Ability to work flex time” is most important.

<u>Incentives</u> (Sample)	<u>Total</u> (1198)	<u>Users</u> (714)	<u>Triers</u> (484)
Cash incentives	27%	26%	27%
Able to work flex time	20%	21%	20%
Able to telecommute	14%	13%	14%
Subsidized bus passes	8%	9%	6%
Guaranteed ride home	7%	7%	7%
Subsidized carpools: money for gas	6%	6%	7%
Guaranteed parking spaces	6%	5%	7%
Subsidized vanpools	3%	4%	2%
Showers/lockers	3%	2%	3%
Preferred parking spaces	2%	1%	3%
Positive management recognition	2%	2%	2%
Covered bike parking	2%	1%	3%
Sweepstakes for prizes	1%	0%	1%

16. Usage Linked to Top Employer Incentives

Finally, respondents were asked “Let’s say your employer were to provide (the respondent’s most motivating incentive) as a part of a program at work to encourage alternative ways of commuting. Using a 10 point scale, where 10

equals 'highly likely to regularly use an alternative means' and 1 equals 'highly unlikely to use,' how likely would you be to regularly use an alternative means of commuting?"

When tied to behavior, the ability to work flex time and/or telework is more motivating than a cash incentive.

<u>Incentives</u>	<u>(Sample)</u>	<u>Triers</u>
Able to telecommute	(69)	8
Able to work flex time	(95)	7.9
Cash incentives	(130)	6.7

17. What Are the Benefits of Alternative Transportation? (Brand Workshop Participant Responses)

Participants in the brand workshops were asked to list and rank the benefits of using alternative transportation.

The top ranked benefits agreed upon by the brand workshops include "Saving Money", "Saving the Environment," and "Reducing Stress."

<u>Benefits</u>	<u>Votes</u>
Save money, eliminate car expense	49
Save/maintain the environment, a better world for our children	32
Higher quality of life/less stress	27
Stronger/more connected communities	20
Better use of time for work, hobbies, etc.	13
Save public spending on roads/less pavement/more parks	10
Social, make friends, discuss work	8
Self-esteem/feel good from "doing the right thing"	8
Increased economic vitality	7
Simplify one's life	6
Convenience/dependability/fun	6
Less congestion	4
Less dread/more productive at work	4

18. Key Alternative Transportation Benefits

Respondents were read a list of benefits and then were asked "Please tell me the degree to which each of the following has an impact on your decision to use an alternative means of commuting. Use a 10 point scale, where 10 equals 'It is very important' and 1 equals 'It is not at all important'."

The Alternative Transportation benefit list was determined by commuter focus group sessions in Seattle and Spokane.

When commuters are provided a list of benefits to rate, “Saving the Environment” becomes the top benefit.

<u>Benefits</u> (Sample)	<u>Total</u> (1198)	<u>Users</u> (714)	<u>Triers</u> (484)
Save the environment, provide a better world for children	8.1	8.2	8.1
Living a healthier life, feel free to enjoy life more	7.9	7.9	7.9
Feeling good I am doing the right thing	7.7	7.8	7.5
Conserve fuel and natural resources	7.6	7.8	7.4
Help reduce congestion on our roads	7.6	7.7	7.4
Have money to do the things I want	7.6	7.6	7.5
Feeling I made a smart decision; the smart thing to do	7.6	7.7	7.4
Save money by reducing gas, car expense, parking	7.5	7.6	7.2
Reduce stress by not having to drive in traffic	7.4	7.6	7.1
Arrive at work more relaxed and be more productive	7.3	7.5	7.2
Make better use of time while commuting by reading, etc.	7.1	7.2	6.9
Reduce wear and tear on car, keep it looking nice longer	7	7.1	6.9

19. Most Important Benefit

Respondents were then asked “Which of the following (read the top 4 benefits the respondent mentioned in their interview) is the absolute most important?”

The “absolute most important” benefits are “Save the environment,” “Saving money,” and “Reducing stress.”

<u>Benefits</u> (Sample)	<u>Total</u> (1198)	<u>Users</u> (714)	<u>Triers</u> (484)
Save the environment, provide a better world for children	31%	29%	33%
Save money by reducing gas, car expense, parking	13%	14%	10%
Reduce stress by not having to drive in traffic	10%	11%	10%
Living a healthier life, feel free to enjoy life more	7%	7%	7%
Help reduce congestion on our roads	7%	6%	7%
Have money to do the things I want	7%	6%	8%
Make better use of time while commuting by reading, etc.	7%	9%	5%
Conserve fuel and natural resources	6%	6%	5%
Arrive at work more relaxed and be more productive	4%	4%	5%
Reduce wear and tear on car, keep it looking nice longer	4%	4%	3%
Feeling good I am doing the right thing	2%	2%	3%
Feeling I made a smart decision; the smart thing to do	2%	2%	2%

20. Most Important Benefit, By County

All county groups list “Saving the environment” as the most important benefit.

Regional differences are significant, and should be addressed in developing the communications plan. For example: “Reducing stress by not driving in traffic” is more important in King County than Spokane/Yakima. “Having money to do the things I want” is more important in Spokane/Yakima than in King county.

	<u>Total</u>	<u>Clark</u>	<u>King</u>	<u>Snohom/</u> <u>Whatcom</u>	<u>Spokane/</u> <u>Yakima</u>	<u>Thurs/Pierce</u> <u>Kitsap</u>
<u>Benefits</u> (Sample)	(1198)	(100)	(398)	(199)	(180)	(321)
Save the environment, provide a better world for children	31%	23%	26%	32%	33%	38%
Save money by reducing gas, car expense, parking	13%	12%	13%	10%	14%	13%
Reduce stress by not having to drive in traffic	10%	9%	12%	11%	5%	11%
Living a healthier life, feel free to enjoy life more	7%	11%	7%	10%	9%	5%
Help reduce congestion on our roads	7%	5%	8%	8%	2%	7%
Have money to do the things I want	7%	11%	4%	6%	14%	7%
Make better use of time while commuting by reading, etc.	7%	8%	10%	9%	3%	4%
Conserve fuel and natural resources	6%	7%	6%	4%	4%	7%
Arrive at work more relaxed and be more productive	4%	3%	5%	5%	4%	3%
Reduce wear and tear on car, keep it looking nice longer	4%	4%	2%	3%	6%	4%
Feeling good I am doing the right thing	2%	2%	3%	2%	4%	1%
Feeling I made a smart decision; the smart thing to do	2%	4%	3%	1%	3%	1%

21. Usage Linked to Top Benefits

Respondents were finally asked “Let’s say you have access to a usable alternative means of transportation that provides (the respondent’s most important benefit.). Using a 10 point scale, where 10 equals ‘Highly likely to regularly use an alternative means of commuting’ and 1 equals ‘Highly unlikely to use an alternative means of commuting,’ how likely would you be to regularly use, or increase using, an alternative means?”

Key Finding: When tied to changing behavior and adopting alternative transportation, the immediate benefits of “Saving money” and “Reducing stress” are as motivating as “Saving the environment.”

<u>Benefits</u> (Sample)	<u>Triers</u>
Reduce stress by not having to drive in traffic (46)	7.4
Save the environment, provide a better world for children (160)	7.3
Save money by reducing gas, car expense, parking (50)	7.2

22. Motivations Leading to the Initial Trial of Alternative Transportation (Focus Group Participant Responses)

During the four focus groups in March, focus group participants were asked “What specific realization, event, or feeling got you to try alternative transportation for the first time?”

Group statements clearly indicate that trial leads to use:

- ◇ **“I started because I had to, then I began to like it.”**
- ◇ **“I tried it, and I liked it.”**

Responses

- I started because I had to, then I began to like it.
- We lost our second car. I tried it and liked it.
- The company I work for paid my bus pass
- The cost savings in driving the car.
- The cost of parking downtown
- The environment. I wanted to be part of the solution
- My work offers incentives: free parking, free bus pass
- My wife changed jobs, now it is easier to car pool
- My car was hard to start, so I took the bus.
- It was warm out, a nice day, so I rode my bike.
- I was doing something good for my self by walking

BRAND LADDERS DEFINED

1. Brand ladders are a research technique used to establish the hierarchy of consumer motivations, feelings, and values that drive their purchase decision, ranging from the very functional (i.e. “I can save money by riding the bus”) to self-esteem and identity (i.e. “I’ve made a smart decision”).

Weaker brands generally associate themselves only with lower-level functional attributes. The strongest brands build loyalty towards products and services by speaking to the customer’s emotional needs of identity and self-esteem.

The goal is to increase alternative transportation’s brand strength by identifying and claiming the higher order emotions and benefits that are most motivating to commuters.

2. Alternative Transportation Brand Ladders (Source: Focus Groups)

- ◇ The following are brand ladders constructed by commuters in focus groups. The responses within each ladder rung are unaided, top-of-mind participant responses.
- ◇ **Important Finding: All the brand ladders for the top rated alternative transportation benefits lead to the higher order benefit of “Relief.”**

“Save Money”

Emotional Identity	Happy Relief Empowered Free
Benefits	More money to spend/invest Keep car longer One less bill to worry about Keep car looking nice Don't feed the oil companies Spend on wants, not just needs
Attribute	Save Money

Save the Environment

Emotional Identity	Great Proud Guilt-free Harmonious Free/problem solved Relieved We're controlling waste A beautiful place for children
Benefits	Less pollution Better air quality Live longer to enjoy life Clear sky Increase economic vitality of state Improves my mood, mental health
Attribute	Save the Environment

	<u>“Reduced Stress”</u>
Identity	Allows me to be myself Relieved Less worry Enjoyment At peace More balanced/centered Tranquil
Benefit	More pleasant life Healthier Can relax Can live longer Be happier More productive at work Can thing more freely
Attribute	Reduce stress

Product Identity Conclusions

Below is a brief summary of the overall conclusions from the Product Identity section of this report:

1. Increasing awareness of alternative commuting choices is the key opportunity.
2. The “Hot Buttons” or key messages that will motivate trial of alternative transportation and actual behavior change include:
 - ◇ Reduce stress
 - ◇ Save money
 - ◇ Save the environment
1. With low awareness brands, the “Brand Story” has to start with tangible, foundation level benefits (i.e., Reduce stress, Save money) that are personally-relevant to the target audience before the higher, but more abstract, emotional benefit, Relief, can be credibly claimed and promised.
2. Trial will lead to regular use “I tried it and I liked it.”
3. Low satisfaction with transit is a barrier to converting Triers to regular users.

Customer Advice to WSDOT

Finally survey respondents were asked “Do you have any other comments or suggestions you’d like to share with the Washington State Department of Transportation?”

Responses mainly related to transit, providing further evidence that the DOT equals transit in most commuters’ minds.

Regional differences are evident in the respondents’ final advice: a need for a light rail mass transit system was voiced by King and Thurston counties and a need for road repair was voiced in Spokane county.

Advice

- ◇ Need light rail mass transit system soon
- ◇ More/better bus routes and schedules
- ◇ Repair the roads
- ◇ More transit to extended areas
- ◇ More buses

VI. Conclusions And Recommendations

Research Highlights:

1. Focus the brand message and media on the following **target audience**:
 - ◇ Age: 25-44 years old
 - ◇ Occupation: Professional, Skilled labor, Administrative
 - ◇ Education: Some college education
 - ◇ Average HH Income: \$57,000
2. Build the **brand identity** on a foundation of benefits that are tangible, personal, and immediate. Triers will choose alternative transportation if they can:
 - ◇ **Reduce stress** by not having to drive in traffic
 - ◇ **Save money** by reducing gas, car expense and parking
 - ◇ **Save the environment** to provide a better world for future generations
 - ◇ These tangible benefits lead to higher level emotional benefits of “**Relief**” and “**Smart.**”
3. Build the brand identity on the “product,” i.e. the wide variety of **commuting choices** (e.g. ride or drive with someone else). **Increase awareness of alternative transportation choices**:
 - ◇ Awareness of choice is the key opportunity.
 - ◇ A perceived lack of choice is the key barrier among non-users.
 - ◇ Only 55% of respondents are aware of transit, 48% are aware of carpools, 20% are aware of bicycles as commuting choices.
 - ◇ Awareness of vanpools, walking, flex time, and telework as alternative transportation choices is very low.
4. Focus on **carpools** as the largest alternative transportation opportunity.
 - ◇ Carpools are the most widely used mode of alternative transportation
 - ◇ Carpools also present a variety of partnering opportunities:
 - ◇ Auto dealers, who see the marketing value of being perceived as responsible citizens and as part of the solution to congestion and saving the environment for future generations.
 - ◇ 1-888 Rideshare and HOV Infrastructure agencies

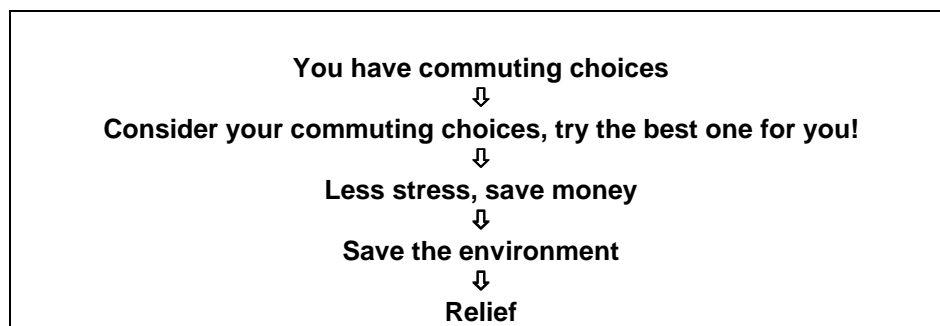
5. **Commuter satisfaction** levels with transit is low compared to other alternatives.

- ◇ Transit has the lowest satisfaction rating and the least positive image. 21% of Triers are dissatisfied with transit. This is a barrier to converting Triers into regular Users.
- ◇ 45% of the total state would support an improved transit service. The range is 49% in King, Thurston, and Pierce counties to 37% in Spokane and Yakima.

6. Work with employers to increase opportunities for **telework** and **flex time**.

- ◇ Employees will chose an alternative way to commute if able to telework or work flex time. In this survey, these incentives are more motivating than cash.

The above conclusions lead to a clear brand identity or story for alternative transportation that says:



A Brand Story is the strategic foundation upon which great creativity is built. The Alternative Transportation Brand Story is built on the foundation of “Choice” and evolves to the emotional benefit of “Relief.”

The Alternative Transportation Brand Identity

Brand Name Recommendation

To most respondents, the “WSDOT” or “Alternative Transportation” brand today is: Transit or “the Bus.” This is unsatisfactory. Research shows that there the image of transit and the bus is negative and an inappropriate brand image for Alternative Transportation (e.g., transit = rude behavior).

In branding, you can either brand the company (i.e. Sony) or the product (i.e. Tide). BrandSolutions sees little value in branding the company “WSDOT” or “Alternative Transportation.” Instead, we recommend branding the wide variety of commuting choices:

- ◇ Ride or drive with someone else
- ◇ Take the bus
- ◇ Ride a bike
- ◇ Work from home
- ◇ Flexible work schedule
- ◇ Walk
- ◇ Others

The rationale for this recommendation includes:

- ◇ Research results that indicate low unaided awareness of even “The bus” as an alternative to driving alone.
- ◇ Creating a name for the program just creates one more thing that commuters have to remember. Calling the modes by their vernacular “generic” names keeps it simple for commuters to understand.
- ◇ It emphasizes the core idea that commuters have choices - to not drive alone.
- ◇ It brands the actual choices commuters make. It provides the strongest, most specific call to action. The specific choices “glue” the commuter to a specific way of commuting other than driving alone, which is what we want!

The Positioning Statement

A positioning statement is a one- to two-sentence statement that should be the most repeated message to the target audience. Not a tagline, slogan, or ad copy, the positioning statement provides the foundation message for advertising and marketing communications. A positioning statement should be customer and benefit oriented; it should meet the 3B Positioning Test by succinctly telling what Business you are in, your top Benefit, what makes you Better than driving alone.

Because the top benefits are the same for both Users and Triers and across all counties, the Alternative Transportation Positioning Statement is simpler than most positioning statements BrandSolutions has created. The Positioning Statement is:

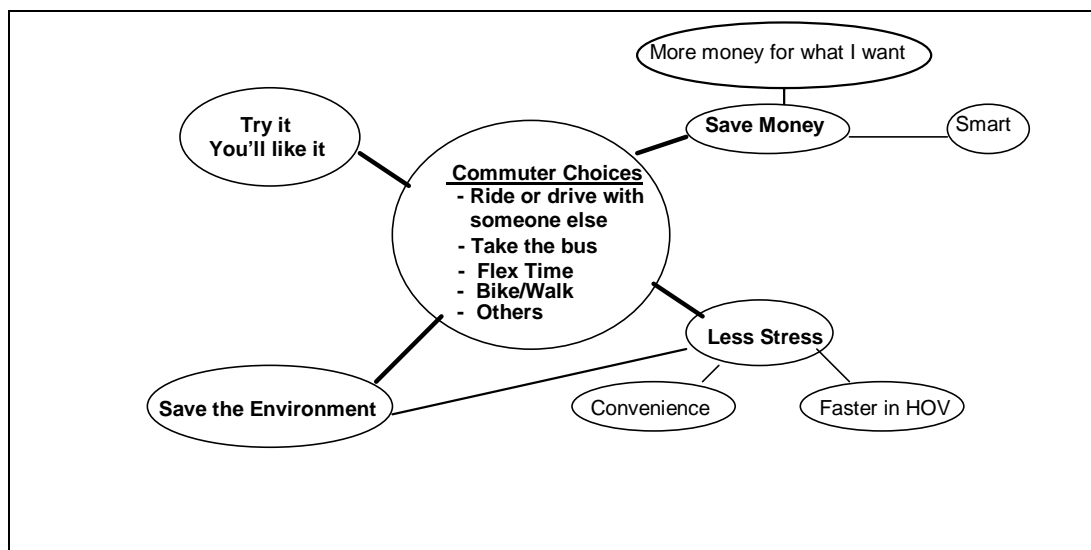
Commuters have a wide variety of choices, in addition to driving alone, that can save them money, relieve stress, and help save the environment.

Brand Associations

Brand Associations are what customers think of when they see or hear the brand name and/or logo. They are ideally based on customer perceptions and behavior, not what the organization thinks. Brand associations are based on the science of memory and how people organize and remember what they know about a brand. By actively and purposefully communicating brand associations to prospective customers, attitudes, perceptions, and behavior can be changed.

Brand associations are best depicted by using a Brand Association Nodal Map, actually termed a mind or memory map. The Alternative Transportation Nodal Map shows the best way to communicate the benefits of Alternative Transportation in order to most effectively change perceptions and behavior. As with the Positioning Statement, this Brand Association Nodal Map is simpler and more focused than most Nodal Maps we have created. This is an advantage to WSDOT and its constituencies because fewer messages make it easier and more cost effective to communicate the Brand Associations and get them remembered.

The Alternative Transportation Brand Association Nodal Map



Recommended Brand Strategies

Consistently and Repetitively use the Alternative Transportation Brand Identity

1. A brand identity can only be created by repetitively communicating a clear and consistent brand message.

2. Build the brand identity around positive brand associations. Avoid attempting to create guilt among Triers regarding commuting by SOV. Triers feel very positive about their cars; many say they commute by SOV because they “Like to drive.” We do not recommend a negative campaign.
3. Build the alternative transportation brand by focusing first on the immediate personal benefits that drive and reinforce behavior change:
 - ◇ Reduce stress
 - ◇ Save money
4. Balance the personal benefit message with the altruistic benefit of “Saving the environment for future generations” as a secondary association.
5. These brand associations apply to all modes of transportation and equally support all consistencies that share the goal of reducing exclusive reliance on SOVs.
6. Focus first on increasing awareness of carpooling, or “riding or driving to work with another person,” as the transportation choice that will deliver the most results in the shortest amount of time. Rationale:
 - ◇ This is a truly umbrella message that is not dependent on infrastructure. Everyone who commutes by car already has the basic equipment.
 - ◇ It follows the natural flow of customer behavior. Commuters are already choosing carpooling over transit, the next most used alternative, by a margin of two to one.
 - ◇ “Driving or riding with another person” has a positive image among commuters.
 - ◇ Early results will help assure a sustainable program.
7. Carpooling and other alternative transportation modes represent significant potential partnering opportunities:
 - ◇ Partner with car dealers to promote carpooling. Position them as “part of the solution,” responsible members of their communities.
 - ◇ Partner with health associations, such as the American Cancer Society and Blue Cross, who share a goal of reducing the health risks from air pollution.
 - ◇ Partner with 1-888 Rideshare and HOV Infrastructure

Consistently and Repetitively use the Alternative Transportation Brand Identity

Recognize regional differences.

- ◇ Relief from the stress of commuting” is more important in King and other metro counties.
- ◇ “Money” is more important in Spokane and rural counties.

To Help CTR Impacted Employers:

1. Make employers aware that providing the option of flex time or telework is more motivating to their employees than even cash incentives.
2. Make employers aware that their providing a “Guaranteed ride home” for their employees removes one of the top barriers to employee acceptance of the CTR program.
3. Provide employers a “Kit” to help companies create better and more on-target communications about the benefits of the CTR program and to clarify concerns voiced by employees, such as a lack of a guaranteed ride home. This will also ensure that a consistent message is communicated to all commuters.

Link the Alternative Transportation Brand to Operations

1. Brand is not about exaggeration or hype.
2. It’s about giving your commuter customers what they want.
3. When you have solid programs to give customers what they want, customer satisfaction increases, leading to increased adoption of and loyalty to alternative transportation.

Implement the Alternative Transportation Brand

Develop a Brand Steering Committee composed of senior level DOT managers to provide strategic direction and formal program approvals. At the same time, set up a cross-functional committee to be responsible for brand implementation and accountability. Utilize BrandSolutions as the Alternative Transportation “brand advocate” and the “Voice of the Customer.”

Evangelize the Alternative Transportation Brand Internally

1. Organize an event and create internal communications to announce and publicize the campaign and program:

2. Internal announcement of the branding program
3. Implementation seminars
4. Brand champion recognition events
5. Incentive programs that reinforce “Giving customers what they want”

Transit Strategy: Give Customers What They Want

Concerns regarding transit, which were noted in the focus groups, have been quantified by this study. The high level of Trier dissatisfaction with the current transit system is a significant barrier to widespread adoption of transit as an alternative transportation choice.

The solution is to give customers what they want:

- ◇ More frequent transit
- ◇ Easier to understand transit schedules
- ◇ Reliable transit schedules
- ◇ Better informed and friendlier transit drivers
- ◇ Sheltered transit stops
- ◇ Better security and policing

Key Benchmarks of Success

The next wave of quantitative research should measure progress against the following benchmarks.

- ◇ Unaided awareness of choices
- ◇ Unaided awareness of key benefits
- ◇ Attitudes/image of choices
- ◇ Satisfaction with choices
- ◇ Increased Triers and Users
- ◇ Actual behavior change